



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

DOD: 4-4-13	BETTY A. PATE , Daughter, was appointed as Executor with Full IAEA without bond on 7-24-13 and Letters issued on 8-2-13.	NEEDS/PROBLEMS/COMMENTS:
		Continued from 9-19-14, 11-19-14
Cont. from 091914, 111914	At the hearing on 7-24-13, the Court set this status hearing for the filing of the first account or petition for final distribution.	Minute Order 11-19-14: Betty A. Pate is ordered to be personally present on 1-8-15 to answer the Court's questions.
Aff.Sub.Wit.		1. Need first account or petition for final distribution.
Verified		
Inventory	Inventory and Appraisal filed 4-24-14 indicates a total estate value of \$644,428.38 consisting of real property, an Installment Note secured by deed of trust with assignment of rents, and a vehicle.	
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.	The first account or petition for final distribution is now due. Probate Code § 12200.	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Status Report filed 9-16-14 (not verified) states the only real property of the estate has been sold and the only impediment to closing the estate is settlement with the California Franchise Tax Board. The Executrix has taken the position that no taxes are due to the State from the sale and is discussing said issue with the Board. Upon resolution, the estate should be in a position to close.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting	Status Report filed 11-14-14 (not verified) states there have been continuing efforts by the estate representative to conclude this issue with the tax board. The attorney is informed and believes that once this issue of tax liability is resolved, the estate should be in a position to be closed.	Reviewed by: skc
Status Rpt		Reviewed on: 12-23-14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 16 - Guidi

DOD: 2-27-14		<p>JANELLE HOVSEPIAN, Sister, was appointed Administrator with Full IAEA without bond and Letters issued on 4-23-14.</p> <p>At the hearing on 4-23-14, the Court set this status hearing for the filing of the Inventory and Appraisal.</p> <p>Status report (unverified) filed 9-25-14 states the inventory is nearly ready to be sent to the probate referee for appraisal. The decedent's predeceased spouse held certain retirement accounts that designated the decedent as beneficiary, but which decedent had not transferred into his name prior to his death. This required additional inquiry by the personal representative. It is anticipated that the inventory will be sent to the probate referee within two weeks and once he returns it, it will be filed. A continuance of 60 days is therefore requested.</p> <p>Status report (unverified) filed 11-13-14 states the Administrator did finally receive the necessary information from TIAA-CREF on 11-6-14 and a complete inventory was mailed to the Probate Referee. It is therefore requested that this status hearing be continued for 45 days to allow the probate referee to complete his work and return the I&A to the attorney for filing.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 9-26-14, 11-14-14</p> <p>1. Need Inventory and Appraisal pursuant to Probate Code §8800 or verified written status report pursuant to Local Rule 7.5.</p>
Cont. from 092614, 111414			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 12-23-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 17 - McIntire</p>	

		MARIA ARACELI CHAVEZ , Mother and Guardian Of the Estate, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> Page 19 is a related case.
		Account period: 11-31-11 through 4-14-14	
		Accounting: \$52,492.54	1. Need filing fee of \$435.00. (Order for Withdrawal of Funds from Blocked Account for filing fee was filed 12-4-14.) 2. Accounting is not verified. 3. Need Notice of Hearing. 4. Need proof of service of the Notice of Hearing on Esmeralda B. Mendez. (Note: Ms. Mendez was present in Court on 11-13-14.) 5. Need Order. <u>Note:</u> The minor will attain the age of 18 in December 2014 therefore, a status hearing will be set on Wednesday, February 4, 2015 at 9:00 a.m. in Dept. 303 for the filing of a final accounting.
		Beginning POH: \$52,239.82	
		Ending POH: \$52,492.54 cash plus a 35.5% interest in the home	
Cont from 082114, 100914, 111314		Petitioner states all cash has been in an interest bearing blocked account at Bank of America. See attached account statement. In addition, with the distribution of \$25,000 dollars reported on the First Accounting, a home was purchased on 11-30-11. The amount of the purchase was divided in two and entered in the summary of accounts under non-cash assets. Attached also is a copy of the final settlement statement for the home and the grant deed showing the minors on title. <u>Note:</u> Minute order dated 5/27/14 indicates the Court removed Maria Araceli as guardian of the estate and appointed the Public Guardian. Minute order dated 7/22/14 states the court will consider vacating its prior order appointing the Public Guardian upon the filing of a declaration from Ms. Chavez explaining why she should be reappointed and the Public Guardian relieved. Declaration of Maria Araceli Chavez filed on 7/31/14 states there is no one who has her daughters best interest in mind like she does. She would like to conserve as much money in their accounts as possible for their education. Ms. Chavez states she has been the guardian for the past 5 years and would like to continue. Declaration filed 9/8/14 provides the ownership percentages in the home and revised summary that includes the minor's interest in the home. Minute Order 11/13/14: The Court does not feel it is necessary to involve the Public Guardian at this point. Examiner Notes handed in open Court; matter continued to 1/8/15 for defects to be cured.	
Aff.Sub.Wit.			
Verified			
Inventory	X		
PTC			
Not.Cred.			
Notice of Hrg	X		
Aff.Mail	X		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order	X		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Second Accounting

Ruby Isela, age 11		MARIA ARACELI CHAVEZ , Mother and Guardian Of the Estate, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Please see related case on page 18. 6. Need filing fee of \$435.00. (Order for Withdrawal of Funds from Blocked Account for filing fee was filed 12-4-14.) 7. Accounting is not verified. 8. Need Order. Note: A status hearing will be set on Wednesday, May 11, 2016 at 9:00 a.m. in Dept. 303 for the filing of the third account.
Account period: 11-31-11 through 4-14-14 Accounting: \$52,492.54 Beginning POH: \$52,239.82 Ending POH: \$52,492.54 (cash plus a 35.5% interest in the home)			
Conf. from 082114, 100914, 111314		Petitioner states all cash has been in an interest bearing blocked account at Bank of America. See attached account statement. In addition, with the distribution of \$25,000 dollars reported on the First Accounting, a home was purchased on 11-30-11. The amount of the purchase was divided in two and entered in the summary of accounts under non-cash assets. Attached also is a copy of the final settlement statement for the home and the grant deed showing the minors on title.	
<input type="checkbox"/> Aff.Sub.Wit.	<input type="checkbox"/>	Note: Minute order dated 5/27/14 indicates the Court removed Maria Araceli as guardian of the estate and appointed the Public Guardian.	
<input type="checkbox"/> Verified	<input checked="" type="checkbox"/>	Minute order dated 7/22/14 states the court will consider vacating its prior order appointing the Public Guardian upon the filing of a declaration from Ms. Chavez explaining why she should be reappointed and the Public Guardian relieved.	
<input type="checkbox"/> Inventory	<input type="checkbox"/>	Declaration of Maria Araceli Chavez filed on 7/31/14 states there is no one who has her daughters best interest in mind like she does. She would like to conserve as much money in their accounts as possible for their education. Ms. Chavez states she has been the guardian for the past 5 years and would like to continue.	
<input type="checkbox"/> PTC	<input type="checkbox"/>	Minute Order 11/13/14: The Court does not feel it is necessary to involve the Public Guardian at this point. Examiner Notes handed in open Court; matter continued to 1/8/15 for defects to be cured.	
<input type="checkbox"/> Not.Cred.	<input type="checkbox"/>		
<input checked="" type="checkbox"/> Notice of Hrg	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/> Aff.Mail	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff.Pub.	<input type="checkbox"/>		
<input type="checkbox"/> Sp.Ntc.	<input type="checkbox"/>		
<input type="checkbox"/> Pers.Serv.	<input type="checkbox"/>		
<input type="checkbox"/> Conf. Screen	<input type="checkbox"/>		
<input type="checkbox"/> Letters	<input type="checkbox"/>		
<input type="checkbox"/> Duties/Supp	<input type="checkbox"/>		
<input type="checkbox"/> Objections	<input type="checkbox"/>		
<input type="checkbox"/> Video Receipt	<input type="checkbox"/>		
<input type="checkbox"/> CI Report	<input type="checkbox"/>		
<input type="checkbox"/> 9202	<input type="checkbox"/>		
<input checked="" type="checkbox"/> Order	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff. Posting	<input type="checkbox"/>		
<input type="checkbox"/> Status Rpt	<input type="checkbox"/>		
<input type="checkbox"/> UCCJEA	<input type="checkbox"/>		
<input type="checkbox"/> Citation	<input type="checkbox"/>		
<input type="checkbox"/> FTB Notice	<input type="checkbox"/>		

ProPer Larsen, Hazel E. Olsen (pro per – daughter/Petitioner)

ProPer Wilhite, Curtis W. (pro per – son/Petitioner)

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 05/10/08		HAZEL OLSEN LARSEN and CURTIS WILHITE , daughter and son, are Petitioners.	NEEDS/PROBLEMS/COMMENTS: CONTINUED FROM 10/23/14 As of 12/23/14 nothing further has been filed.
		40 days since DOD	Need amended Petition based on but not limited to the following:
Cont. from 102314		I & A - NEED	
<input type="checkbox"/>	Aff.Sub.Wit.		<ol style="list-style-type: none"> 1. Need Inventory & Appraisal completed by a Probate Referee. The Inventory & Appraisal filed with the petition is incomplete (it is not filled out at all). Note: an appraisal by a private appraiser is attached, however the property must be appraised by a Probate Referee as of the date of death. 2. The Petition indicates that the decedent had a predeceased spouse. Need name and date of death of predeceased spouse (should be listed at item 14 of the Petition). 3. The petition is missing attachment 11 which is to state the legal description and APN of the property seeking to be passed with this petition. Attachment 11 should also include decedent's interest in the property (50%, 100%, etc.). 4. The petition is marked at item 1 that petitioners are requesting real and personal property pass to them, however there is no indication what the personal property consists of. All property seeking to be passed with this petition must be listed on attachment 11 and the Inventory & Appraisal. 5. Need <i>Notice of Hearing</i> and proof of service by mail at least 15 days before the hearing to all interested parties.
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	x	
<input type="checkbox"/>	Aff.Mail	x	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 12/23/14
			Updates:
			Recommendation:
			File 22 – Meeks